Appendix C: *e*MOD User's Manual

Instructions on using the eMOD Online Ticketing System
Code 200.2 Customer Service Office

Table of Contents

How to Access the eMOD System

The eMOD system is accessed through your web browser, depending on the operating system that you are using. Currently:

- Windows XP users can access eMOD using Internet Explorer, Firefox, Safari, or Chrome.
- Mac OS X users can access eMOD using Safai or Firefox.
- Linux users can access eMOD using Firefox.

How to Login

The eMOD system is an official NASA software system and is therefore governed by the Agency's IT policies and regulations.

To access eMOD, enter the following URL into your browser:

https://emod.wff.nasa.gov

You will be prompted to enter the following information:
• Username -- Agency User ID (AUID)
• Password -- AUID Password

(NOTE: The username and password you currently use to log into your computer today.)

Each time you log in to the system, your user information will be verified through the NASA Enterprise Directory. Once your login is verified, the system will pre-populate your user information into the ticket you create.

• **User Information** -
–First name
–Middle name (initial)
–Last name
–Email
–Phone number
–Room
–Code

Figure 1. eMOD Login Page

If any of this information is incorrect, you will need to contact your LIST Monitor to update this information.

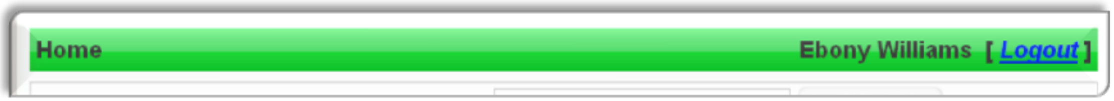
Understanding Your Role in eMOD

Any individual user will have the ability to be part of one or all of the following roles, depending on your functional responsibility. The Customer Service Office will update and maintain these roles in the eMOD system. (See Appendix B1.)

- Requester – The person that creates the Work Ticket. Anyone in the system can create a Work Ticket.
- Owner – The user who has editing privileges to a Ticket. Transferring a Ticket will change ownership. Anyone in the system may be the owner of a Ticket.
- Customer Service Office Representative – Works in the Customer Service Office (CSO); they are in charge of overseeing Work Tickets in the system.
- Service Representative – Works in the service area, has access to the service inbox and is able to sign a ticket for the service.
- Service Manager – Manages the service area, has access to the service inbox and is able to sign a ticket for the service.
- Resource Manager – Fills out funding information, and approves the Work Ticket for funding verification.
- FURB – has authority to sign as Facilities Utilization Review Board Representative.
- FOM – has authority to sign as Facilities Operations Manager.
- Building Manager – has authority to sign as Building Manager.

Understanding Your eMOD Home Page

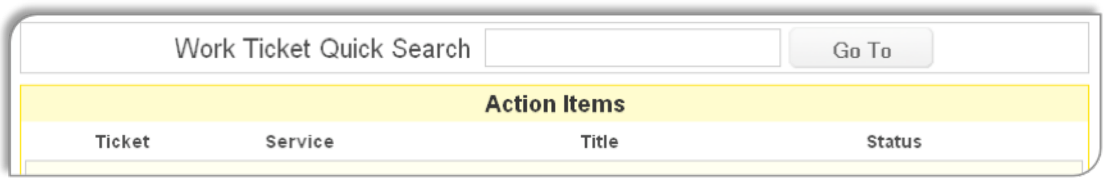
Home Page Elements



• **Navigation Bar -** This is the green bar that extends along the top of the webpage to help you reference the contents. Will show you the user currently logged into the system.

• **Home** - When you click on the “Home” button, it will bring you back to the home page instead of you having to use the back or forward button.

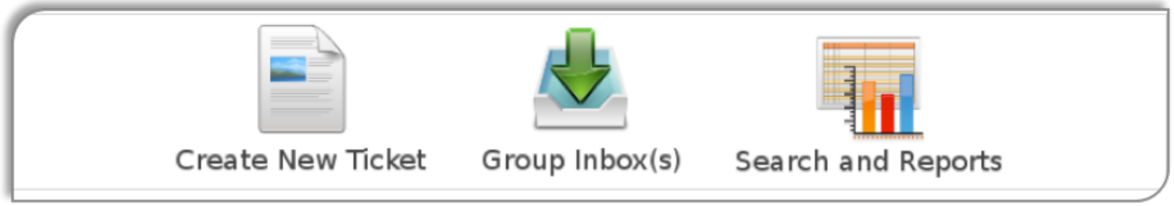
• **Logout -** You will click here when you want to exit the system.



• **Work Ticket Quick Search -** If you want to view a particular ticket that is not in you’re my tickets or action items, you can enter the ticket number here to view that ticket.

** This option is only available if you have a role in the system. See glossary for definitions of system roles.*

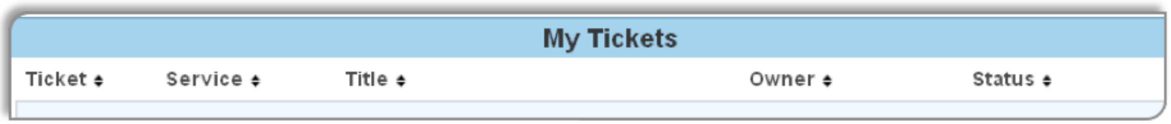
• **Action items -** This is where you will see the ticket once it has been assigned to you. You will also receive an email notification that it is here waiting in your action items area.



• **Create New Ticket** -This is where you go to generate a ticket for submission.

• **Group Inbox** - If you have been assigned to manage a group inbox, this is where you will go to retrieve a ticket and assign it to a specific individual.

• **Search and Reports** - This is where you can go to run a report to find out various types of information regarding tickets that have been generated in the system.



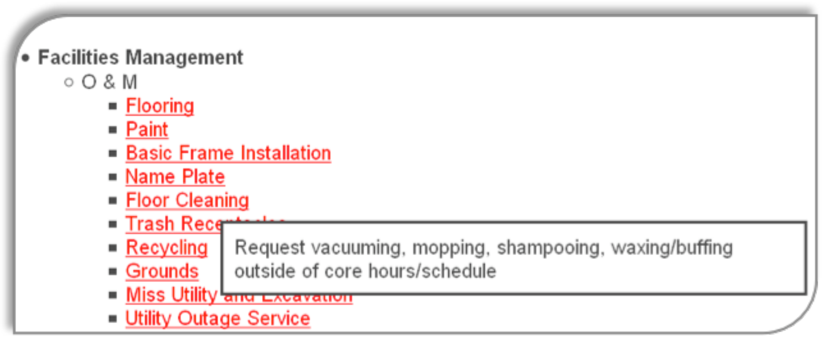
• **My Tickets** - This area is for the person who creates tickets. This is where your tickets will be stored; you are able to track the ticket in this panel at any time.

How to Create a Ticket

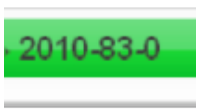
1. Click on create new ticket icon

A listing of services for your area is generated. They are shown by Division and Sub-Groups.   As you run your cursor over the listing of services, you will be able to view the definitions for each service.

2. Click on the link to select your service.



Understanding Your Ticket Number Sequencing



• **2010** = Fiscal Year

• **83** = Sequence number for the ticket. 83 tickets have been submitted in eMOD in 2010. All tickets will show in chronological order, not just the tickets you have created.

• **0** = Represents the primary ticket number. If you add a related ticket, the Number 0 will change to a Number 1. To add a related ticket, which may be part of the service or Project, note the Number 0 will change to a Number 1, as you can now see in Parentheses (1).

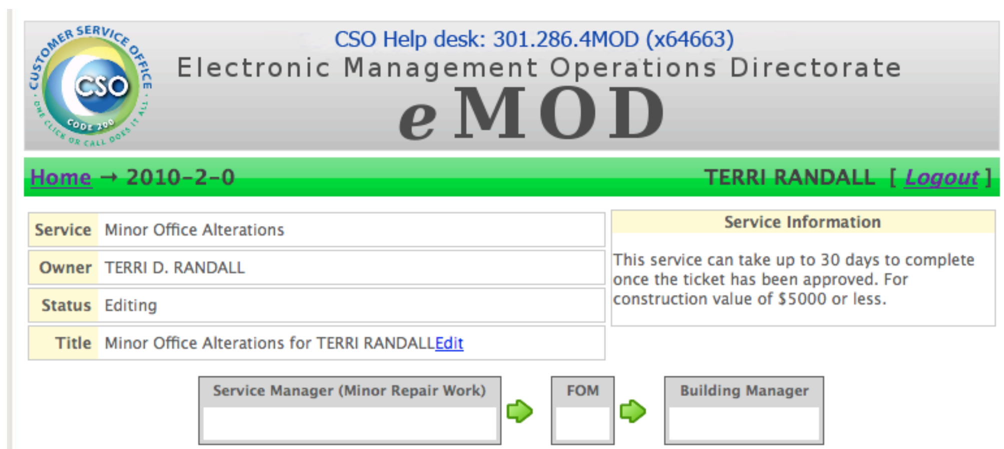
Key Areas of the Ticket

• **Service** – Name of the service that you are requesting.

• **Owner** – Shows the name of the owner of the ticket, which will be the person submitting the ticket.

• **Status** – Shows the tickets' location in eMOD.

• **Title** – This will default to the service that the requester has selected and to the person's name who is submitting the ticket. If you wish to change the title you may do so by selecting the **"Edit "** button. If the service is related to a project you might want that information to reflect that in the title.



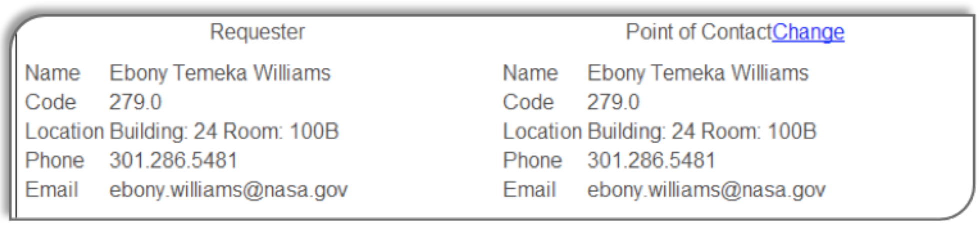
• **Service Information Area** – This area is where the Service Providers will provide the "Lead Times" or any additional information that will benefit the Customer and satisfy their expectations.

Example: Code 220 has many contractual services, so we would not want a customer to expect a service that has a contractual lead time of 7-10 days to think that service would be completed within 3 days.

Approval Flow Process – This series of boxes indicate the approvals required to receive a particular service. Each service has a discrete approval path necessary for that service. Once the responsible person approves the ticket, the color of the box changes to "green" and it is populated with the approver's name and the date & time ticket was approved. A customer can then follow the process of their ticket at any time by simply "viewing" the ticket from his/her "My Tickets" section.

Contact Information

Contact Information is pre-populated in eMOD and you can see this under the **"Requester"** as well as the **"Point of Contact"**



Due Date

The due date can be manually typed in the box or you may select your date by clicking on the calendar icon. Once the system goes live you will not be able to select a date before the established lead times

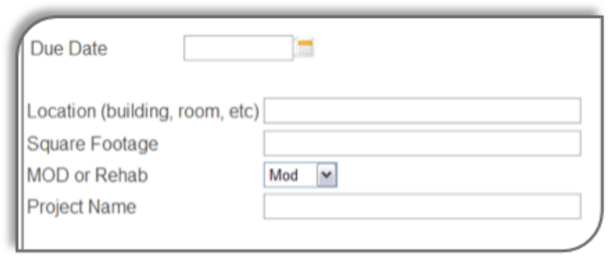
How to Save or Cancel a Ticket

You may save a ticket at anytime to make changes later. Click on "Save"

The ticket will remain in your "My Tickets" section on your eMOD Home Page.

If you change your mind and do not want to submit a ticket, you may cancel the ticket by clicking **"Cancel"** button.

Filling in Information Boxes



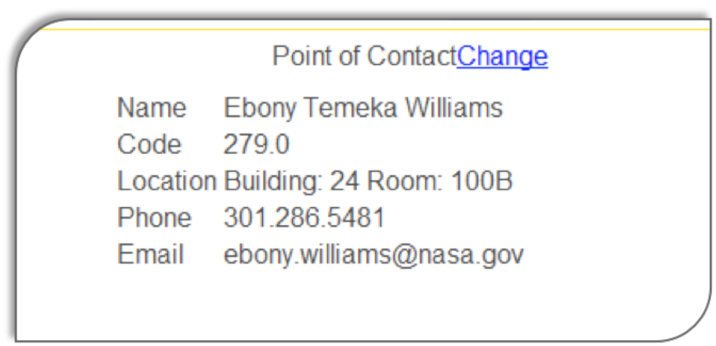
To complete the ticket, you must fill in the information boxes, such as the location, descriptions, and justifications.

Additional Information Box

The additional information box is where the customer would include any detailed information for anyone who has to touch the ticket.

How to Change the Point of Contact

The point of contact (POC) may need to be changed if a customer calls the service representative or the CSO directly to enter a request on their behalf. While entering the ticket the POC would be changed to the person who is requesting the service.

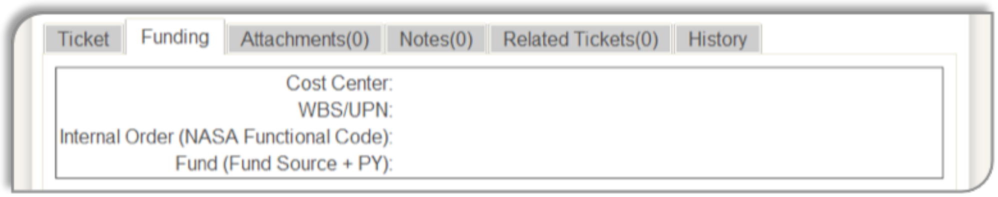


To change the POC, click the POC **"Change"** link and type the name in the text box.

Understanding Work Ticket Elements

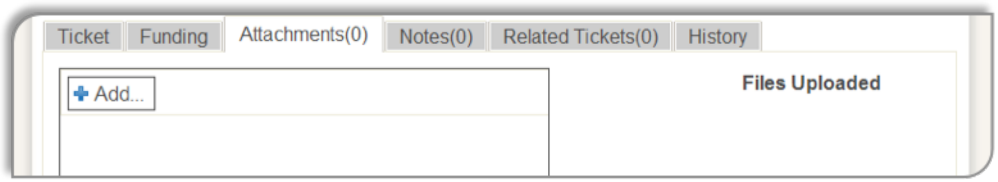
Funding Tab

The Funding Tab is for the resource analysts to populate.

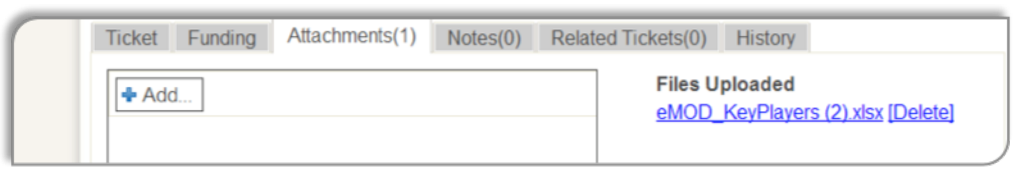


Attachments Tab

This tab allows you to upload attachments. Click on the "**+Add**" button and select any files to be uploaded. You can upload any file type as an attachment including Excel spreadsheets, PDF files, or photos.

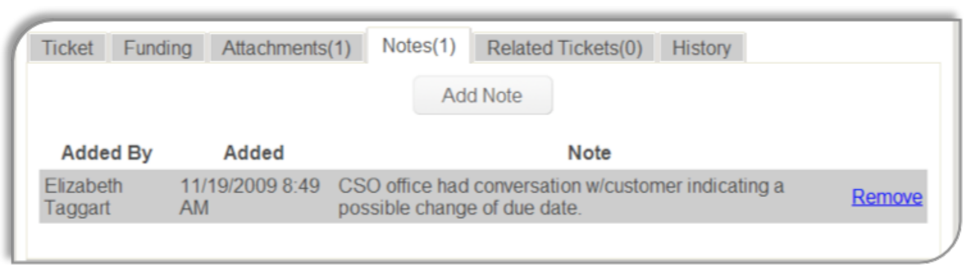


Once file has been added successfully, the file will be highlighted in blue and will be listed on the right side of the page. The number on the Attachment tab in parentheses will change to indicate the number of attachments you have successfully uploaded.



Notes Tab

The Notes tab is for any miscellaneous information documenting a possible change to the ticket. Click on the button to "**Add Note**" to the file. The number in parenthesis shows the number of notes added. Only the creator can remove the notes that they added.

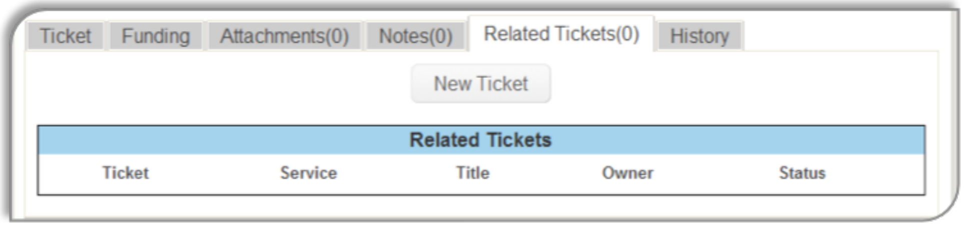


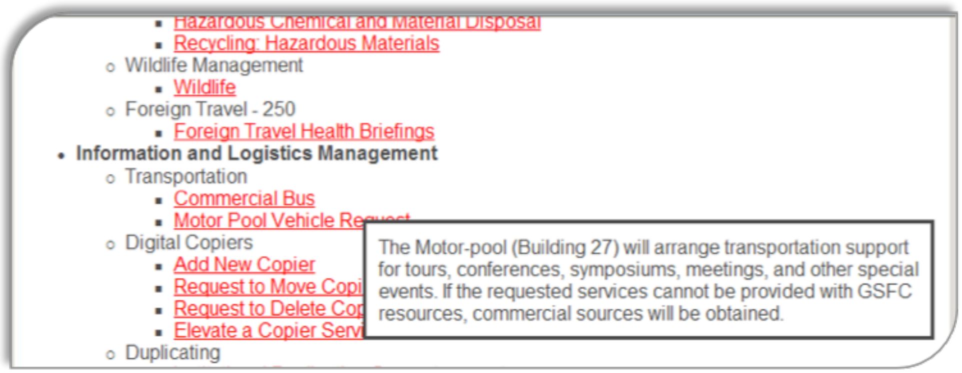
Related Tickets Tab

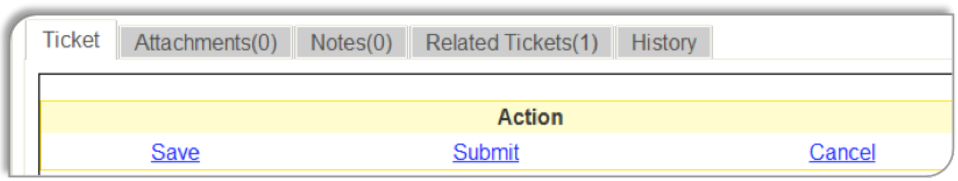
The Related Tickets tab is used for requesting additional services to the primary ticket. To add a related ticket, the **"New Ticket"** button is pressed.

- Select service for the related ticket.

- Once Service has been selected, the related tickets tab in parenthesis will show "(1)", as it being the first related ticket to the primary ticket. The number in parenthesis will increase if other related tickets are created to indicate the total number of related tickets associated with the primary ticket.

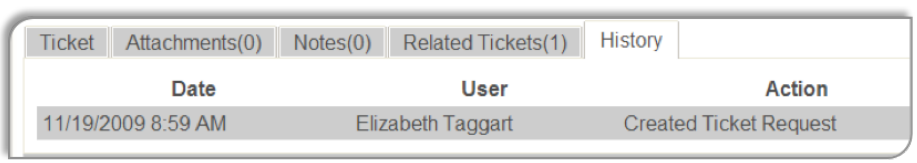






History Tab

The History tab displays an archive of any actions that were taken to the ticket. It displays the date, time, user, and the brief summary of the action performed to the ticket.



How to Manage Your Group Inbox

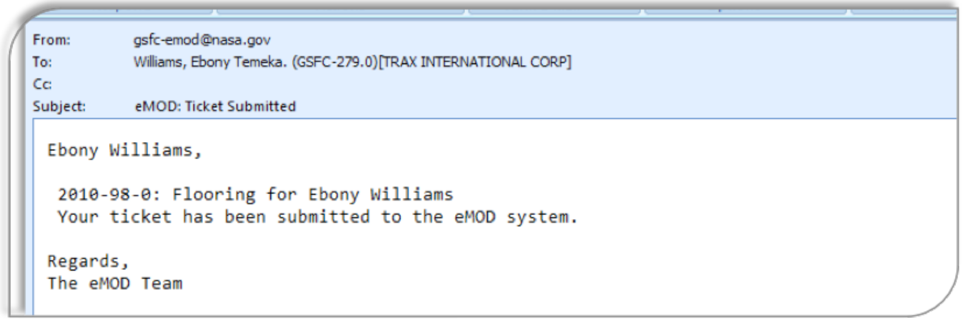
The group inboxes are used to manage incoming work requests. They are the central location for ticket assignment and approval.

- The group inbox is the destination for tickets upon submittal by the requester.

- Each service area will need to have a list of representatives available to take action on tickets submitted.

- Each service area will be responsible for assigning individuals to their group inbox and managing the retrieval process.

Once a requester submits a ticket an email notification will be sent to everyone included in the group inbox to let them know an action item needs to be addressed.

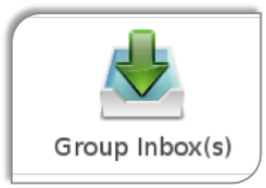


Accessing Your Group Inbox

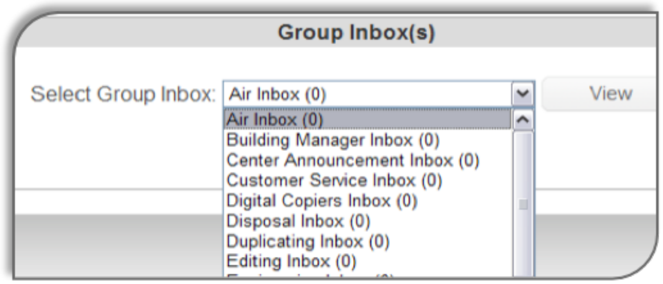
To access the group inbox,

1. go to the home page

2. click on the Group Inbox Icon .



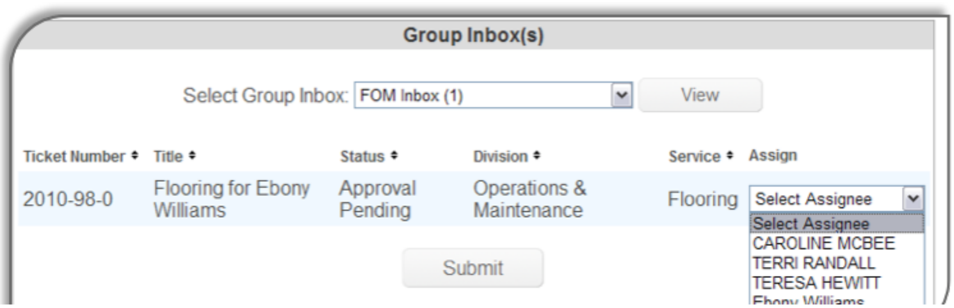
A list of group inboxes will appear in a drop-down menu.
You will only be able to see the inboxes you are responsible for.



3. Click on the desired inbox from the list.

The list of tickets will be displayed.

4. Assign the ticket from the drop-down menu



Once the ticket is assigned, it will be displayed in the person's *Action Items*.

Once the action has been completed, the ticket will be removed from the person's *Action Items* and automatically routed to the next person in the approval process.

Viewing Your Ticket's Status

At any point in the approval process the person who requested the service can view the ticket in their *My Tickets* section on their *Home Page*. It shows the current ticket owner and the status. They can also see where the ticket is in the approval process.

My Tickets

Ticket	Service	Title	Owner	Status	
2010-114-0	Paint	Paint for Ebony Williams	Ebony Williams	Editing	view
2010-98-0	Flooring	Flooring for Ebony Williams	FOM Inbox	Approval Pending	view
2010-3-1	New Print Job	New Print Job for TERESA HEWITT	TERESA HEWITT	In Progress	view
2010-83-0	Flooring	Flooring for Ebony Williams		Canceled	view

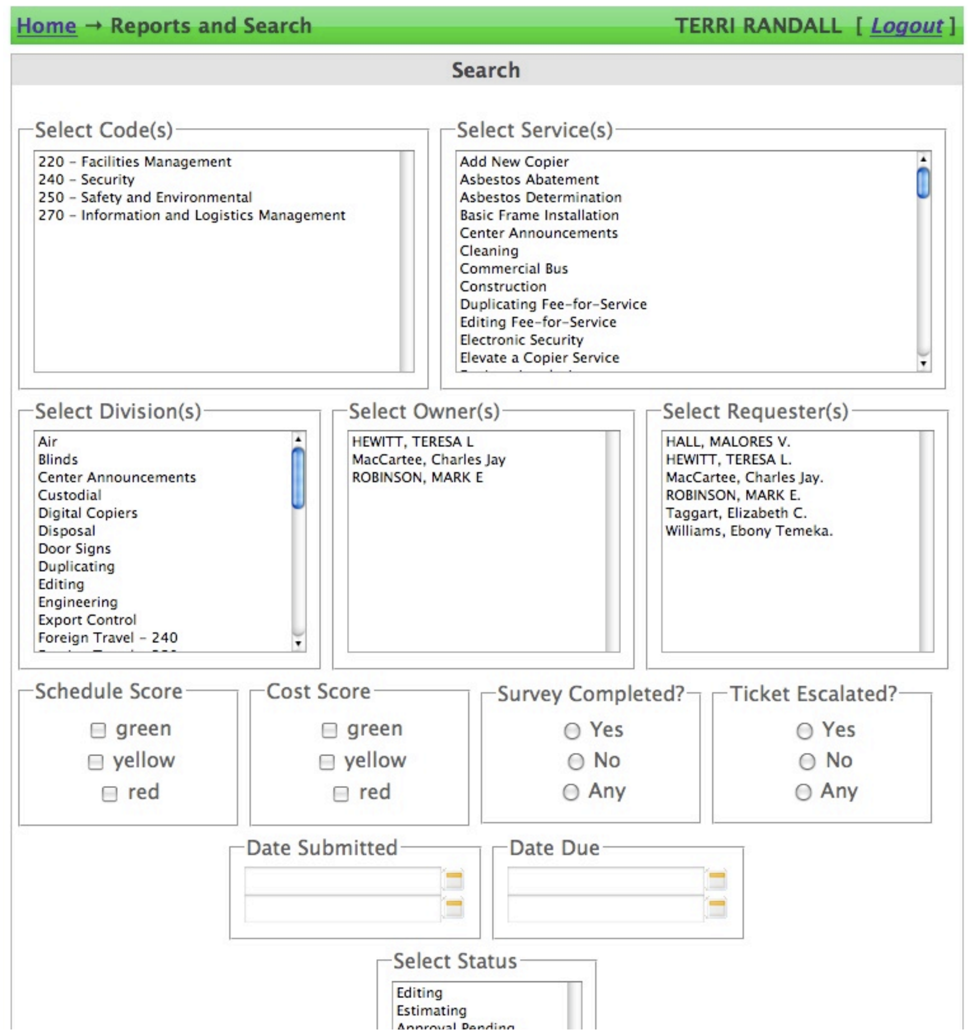
Work Ticket Status Definitions

Work tickets will go through a progression of states from its creation to its completion. These states are not linear, a flow of the work tickets life are charted below.

- **Editing** – The Ticket is being created or changed by the requester.
- **Estimating** – The Ticket requires funding; the Service Specialist owns the Ticket and is creating the estimate.
- **Approval Pending** – An additional signature is required to start work. [name] would be whose signature is required, some examples would be RA, FOM, FURB, etc.
- **In Progress** – The Ticket instructions are being worked on. The final approval signature for funding will also make a Ticket 'In Progress'.
- **Complete** – The Ticket instructions have been done.
- **Closed** – The Ticket instructions have been done and all financial transactions are reconciled.
- **Canceled** – The Ticket was unable to make it to the 'Complete' status. Only the owner of a Ticket can cancel a Ticket. If the Ticket is 'In Progress' only a CSO Representative can cancel the Ticket.

How to Search and Report in eMOD

Click on the **Search and Reports** icon located on the center right of the *Home Page* to bring up the *Search and Reports* screen. There are 12 search selection categories from which to choose when using the *Search and Reports* section. Each category has a listing of possible searches available within that category which can be used to obtain more specific information. Selection choices and access options are determined by user roles. Code management determines an individual's user role and privileges. Only those choices that pertain to your designated user role will appear on the *Reports and Search* screen.



Searching in eMOD

eMOD provides numerous search categories to query the data. Under search option category wanted, scroll down within that box and click to select the line item applicable to your inquiry. You can select more than one category box and line item on your initial selection, although you will have an opportunity to refine your search on a subsequent screen.

1. Click to highlighted your selection(s),
2. Scroll down to bottom center of page,
3. Click on **"Submit"**.

Search selection categories are described below.

• **Select Division** – Listing of Divisions by Code.
Only Management Operations Directors will have access privileges to search by all the Divisions and the ability to view any and all tickets that have been submitted in the eMOD system. Division and Branch Supervisors will have access to their service(s) areas to view any and all tickets under their code. Choosing search by Division only enables management an overview inclusive of all 12 search criteria listed.

• **Select Service(s)** – Listing of Services under specific code
Managers within a Code will have access privileges to search by the service(s) category for their service. This option enables the user to view any tickets under the service area chosen, and can be refined using most categories.

• **Select Group** – Listing of Groups within a specific service code
Service Supervisors and Service Representatives will be able to search for tickets within the specific service group that they represent. They will be able to refine the search under other categories, but will have limited access determined by management.

• **Select Owner** – Listing of current Owners of tickets submitted
Names of individuals listed as the current owner of tickets. The list will include anyone who is currently an owner in the user role of: "Customer" in the editing stage to request a service, but have not yet submitted the ticket; "Manager"- pending approval; "Resource Analyst"- pending approval; " Service Manager"- pending approval; "Service Representative"- assigned to ticket. Clicking on line of name(s) will provide search of all tickets owned by that individual(s) at any given step of ticket's current status process.

• **Select Requester** – Listing of Requesters who have submitted tickets.
Search by name of individual(s) who has submitted a ticket(s) for any service.

• **Schedule Score** – Color Coded Scoring for meeting customers' due date.
This tool can help evaluate time line projection for future jobs.
–Green indicates tickets with due dates that are in acceptable schedule time frame
–Yellow indicates tickets that are approaching their specified due date
–Red indicates tickets that have past their specified due date.

• **Cost Score** – Color Coded Scoring of Cost Comparison
Cost comparison = Estimated Cost/Actual Cost
–Green indicates tickets that are comparably equal in cost.
–Yellow indicates tickets that differ in cost, but have a reasonable explanation for difference
–Red indicates tickets that have a substantial cost difference and may need to be re-evaluated

• **Survey Completed** – Search by: Yes / No / Any

• **Ticket Escalated** – Search by: Yes / No / Any
This search will show if any tickets have escalated past the allotted time frame that a ticket can sit in the "Group Box"

• **Date Submitted** – Enter Beginning Date and/or Ending Date of tickets submitted

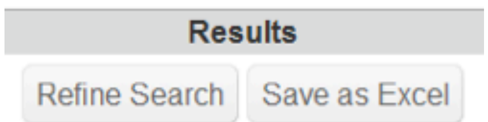
• **Date Due** – Enter Beginning Date and/or Ending Date to search for tickets due in the specified time period.

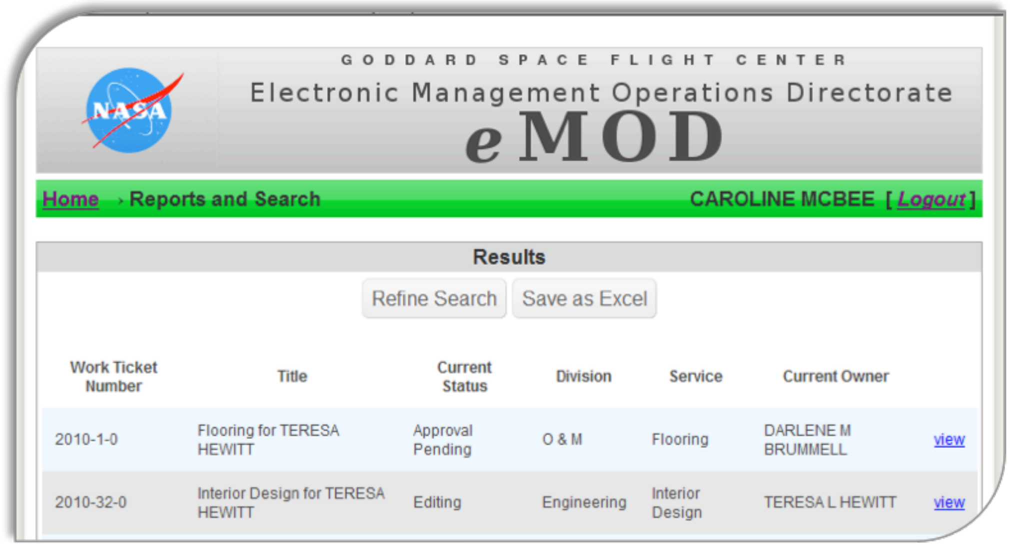
• **Select Status** – Search to see status of ticket process –Editing, Estimating, Approval Pending, In Progress

Viewing Your Search Results

Upon clicking “Submit” on the “Search” screen, a “Results” screen will appear with a listing of all tickets that fall into the search criteria requested. Any of the listed tickets can be viewed individually by clicking on the “View” button at the right of the ticket line item.

The search can be modified again by clicking on **“Refine Search”** in the center of the *Results* screen above the ticket listings.





Generating a Report

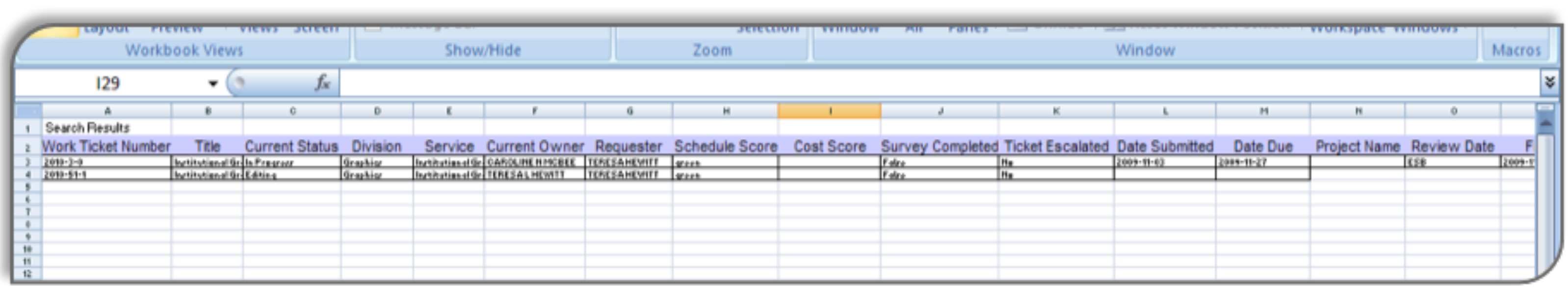
Creating a report in eMOD begins with generating a search.

1. Select the desired search criteria.

If the search results contain the information you need, you can generate a report in MS Excel.

2. To create a report click on “**Save as Excel”.**

The requested data will be downloaded to a spreadsheet.



Glossary

NED	NASA Enterprise Directory
Action Items	List of Tickets that require you to perform an action, e.g., approve or complete work.
Approval Pending	An additional signature is required to start work. [name] would be whose signature is required, some examples would be Funding, Estimate, Manager, FURB, etc.
Attachments Tab	Uploaded file(s) that will be accessible by anyone who can view the Work Ticket.
Building Manager	Person responsible for approving work tickets for Facilities Management Services
Canceled	The Ticket was unable to make it to the 'Complete' status. Only the owner of a Ticket can cancel a Ticket. If the Ticket is 'In Progress' only a CSO Representative can cancel the Ticket.
Complete	The Ticket instructions have been done. Only a CSO Representative or a service representative can mark a Ticket Complete.
CSO Representative	Works in the Customer Service Office (CSO); they are in charge of overseeing Work Tickets in the system.
CSO Utilities	The Customer Service Utilities will only be used and be accessible by the CSO Representatives for user management, etc.
Editing	The Ticket is being created or changed by the requester.
eMOD	electronic Management Operations Directorate System
Estimating	The Ticket requires funding; the Service Specialist owns the Ticket and is creating the estimate.

FOM	Facility Operations Manager
Funding Tab	To be filled out by Resource Manager with relevant information to pay for service
FURB	Facilities Utilization Review Board
Group In-box	A central place for work tickets to be sent when action is needed from that particular service
History Tab	A record of all actions taken for a ticket will be kept here
In Progress	The Ticket instructions are being worked on. The final approval signature for funding will also make a Ticket 'In Progress'
My Tickets	List of Tickets Submitter has created
Notes Tab	The notes tab will allow anyone to leave a comment viewable to everyone.
Related Tickets Tab	The Related Tickets tab displays a list of Work Tickets associated with the current Ticket being viewed.
Requester	The person who initiates a ticket.
Requester's Manager	Person responsible for approving work tickets submitted by Requester

Resource Manager	Fills out funding information, and approves the Work Ticket for funding verification.
Save	A work ticket can be saved for later submittal or submitted at the time of creation.
Scores	Captures and rates performance data based on pre-determined criteria. Displays in Green, Yellow or Red "traffic light" format.
Service Manager	Person responsible for approving work in a technical area.
Service Representative	Works in the service area, has access to the service inbox and is able to sign a ticket for the service.
Ticket Escalation	Period of time a ticket can remain in an In-Box without being assigned to a Service Representative
Survey	Used to rate the performance demonstrated by the other parties involved
Ticket Status	Where the ticket is in eMOD after it has been submitted
Ticket Title	Service you Select from Listing of Services
Transfer Tickets	CSO can transfer ownership of a ticket to another user.
Un-cancel Ticket	Reactivates a ticket that was cancelled